

## Summary – Writing Specifications for Food Service Equipment

### What is a Specification?

A specification is a statement that includes a detailed description or lists features of equipment. A specification will include all the technical details and requirements that the purchaser has in mind for the equipment. The specification will:

- Define what is needed for the equipment. It should identify the minimum requirements.
- For custom equipment describe to the manufacturer what features, capabilities, or construction materials are needed for that equipment.
- Provide a receiving document to verify correct delivery.

A specification could be:

- A brief statement that includes a specific manufacturer's model number.
- A generic description for equipment that many manufacturers could provide. A generic specification may result in lower equipment prices.
- A detailed description that includes all required features and quality level requirements. For example if requesting a work table, you may want to specify the number of the stainless steel (SS) for the table top. The higher the number of SS, the lighter the weight.

When writing a specification, keep it:

- Simple, but exact.
- Easily identifiable using common terms.
- Reasonable, as unnecessary specific detail may be expensive and restrictive.
- Capable of being met by several bidders for the sake of competition.
- Clear and understandable.

### Terminology for Specifications

- **Option:** An option is a variance from the standard production model and may increase the purchase price. All options must be included in the specification. An option may not be added later. Example: For a reach-in refrigerator you specify the option of half glass doors instead of a full height solid door.
- **Accessory:** An accessory is also a variance, but may be purchased at a later date. For example, an extra-depth convection oven is an option; however, cooking racks are an accessory; or an accessory on a refrigerator would be additional epoxy coated shelves.
- **Shall:** Shall is used to express a binding requirement.
- **Will:** Will is used to express a statement of purpose on the part of the purchaser or to express a future tense.
- **Should or may:** Should or may are used to express a non-mandatory statement.

### Equipment Size

For assistance in determining equipment size requirements based on the number of meals served, refer to: <http://www.nfsmi.org/documentlibraryfiles/PDF/20111128121423.pdf>

### **Things to Consider When Writing a Specification:**

- What type of equipment you are requesting?
- What quantity is needed of each piece of equipment?
- What capacity is needed?
- Where there is an option, what construction materials should be used, example do you want a refrigerator with a stainless steel exterior and interior or aluminum exterior sides and interior and stainless steel front?
- What power source is required (i.e., gas, electric, steam coil or direct steam) that matches what you have available?
  - Do you have gas available or only electricity?
  - What is the voltage and phase of your available electric supply?
  - Do you need to specify a particular type of plug to match your outlets?
  - For equipment that has plumbing connections, what size water lines are needed?
  - Do you have adequate drains to handle any discharge water in the location you want to place the equipment?
  - If the equipment requires steam do you have available the required steam pressure? Is the steam potable (approved to be sanitary)?
  - Are gas, water, or steam pressure regulators required?
  - If it is equipment that needs to be placed under a hood, do you have adequate space under the hood?
  - Does that hood have adequate air circulation (CFM's) to handle the additional exhaust load from the piece of equipment?
- Are there special features, options, or accessories that you want to specify?
- Will the equipment be fixed in place or installed on casters? What size casters?
- Is the equipment listed by the National Sanitation Foundation (NSF) as required by the Food Code?
- Does the equipment have other certifications and approvals that may be required (UL, CSA, AGA)?
- Is the equipment Energy Star rated?
- What warranty length is required? Do you need an extended warranty?
- Service requirements – Is service needed within a certain time frame?
- Freight and delivery specifications
  - Do you want the equipment delivered to the dock or uncrated, set in place, and affixed to the floor if needed?
  - Do you need a demonstration of equipment?
  - Are specific delivery dates and times required?
  - Are there penalties if the equipment is delivered earlier or later?
  - Do you have a loading dock or is a lift-gate delivery required?
  - Are there limits on the size of truck that can access your delivery area?
  - What are the required terms for who will pay for the freight charges and where the ownership of the equipment changes hands?
    - Free (or freight) on Board (F.O.B.) Origin – the ownership changes at the manufacturer/factory to the school/purchaser
    - F.O.B. Destination – the ownership does not change until the equipment is delivered to the school foodservice
    - Freight prepaid – seller pays the freight

- Freight collect and allowed – buyer (school district) pays the freight charges, but deducts charges from the seller’s invoice for goods
  - Notes:
    - If equipment is shipped to the dealer rather than directly to the school then the dealer is responsible for receiving it, inspecting it for any damage and then delivering it to the school at a defined date and time. When equipment is delivered from manufacturer to the school, the school assumes responsibility for any damage that may not be visible until the equipment is uncrated.
    - Shipment from the manufacturer to the dealer, then from dealer to the school may be the best option.
- Specify Installation Requirements
  - Who will receive, uncrate, and set the equipment in place? Who will remove the packing crates?
  - Who will install the equipment?
  - Do the installers need to have any certifications or specialized training?
  - Are installation charges included in the price or are they an extra charge?
  - Who will make the final utility connections? Does the school district have qualified staff to complete these tasks?
  - If equipment is being replaced, who will disconnect utilities and remove the old equipment?
  - Who will apply for permits if required?
  - Who will install, replace, or adjust fire protection equipment for the new equipment?

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<http://www.nfsmi.org/documentLibraryFiles/PDF/20090312115009.pdf>

Refer to Chapter Seven of this document for more details and sample documents for specifications and bids.